

08/22/97 13:38 BELL SOUTH REGULATORY - 858 222 8648

NO. 955 P035/068

- **STANDARDS** - The fact that both levels scored well in this subscale is encouraging from the standpoint that their attitudes are that effective measurement tools could be used to monitor and control the work processes. Unfortunately, standards do not exist in your current LCSC system, however, if they are developed with your people, their attitude would indicate that they are receptive to using work measurements to identify and respond problems.

- In the subscales that measure **SOURCE OF MOTIVATION, CHANGE POTENTIAL** and **COMMUNICATIONS**, both levels demonstrated relatively positive attitudes. We will build on these areas of strength to facilitate the specific training needed in the areas of work assignment, follow up, active supervision, clarification of roles / responsibilities and organizational development.

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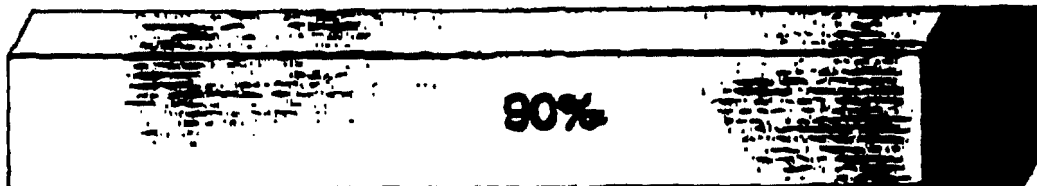
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## BELLSOUTH - LCSC MANAGEMENT OPERATING SYSTEM EVALUATION

☒ ELEMENT EXISTS     
 ☐ EXISTS-REQUIRES UPGRADE  
   
 ☐ POOR UTILIZATION     
 ☒ DOES NOT EXIST  
   
   
 ☒ IS NOT UTILIZED

SYSTEM ELEMENT	EXISTS	DESCRIPTION	UTILIZATION
VOLUME FORECAST	<input type="checkbox"/>	VOL FORECAST DOES NOT MATCH CROWING PLANS DOES NOT HAVE FEEDBACK ADJUSTMENT LOOP	<input checked="" type="checkbox"/>
PRODUCTION STANDARDS	<input checked="" type="checkbox"/>	EXISTS AS AN OVERALL EXPECTATION, DOES NOT ACCOUNT FOR MIX & UNKNOWN EFFICIENCY FACTORS	<input checked="" type="checkbox"/>
STAFFING DETERMINATION	<input type="checkbox"/>	LOAD IS INCOMPLETE, MISSING ACTIVITIES, STANDARDS UNREALISTIC VARIABLES AND NOT MIX SENSITIVE	<input checked="" type="checkbox"/>
SHORT RANGE PLAN	<input type="checkbox"/>	IT IS NOT TIED TO THE INPUT RATE IT IS NOT BEING USED BY THE SUPERVISORS	<input checked="" type="checkbox"/>
WORK ASSIGN / FOLLOW UP	<input type="checkbox"/>	GUIDELINES EXIST FOR BOTH PRIORITY AND MONT. EXPECTATIONS, NOT BEING USED BY SUPV.	<input checked="" type="checkbox"/>
BEST PRACTICE DEFINATION	<input type="checkbox"/>	SOME EXIST AT A HIGH LEVEL, HOWEVER DETAILED PROCESS DEFINATION DOES NOT EXIST	<input checked="" type="checkbox"/>
BACKLOG CONTROLS	<input type="checkbox"/>	EXISTS BUT THEY ARE NOT BEING USED PROPERLY BY ALL SUPERVISORS, DOES NOT FEED THE FORECAST	<input checked="" type="checkbox"/>
PERFORMANCE REPORTING	<input type="checkbox"/>	SOME VOLUME TRACKING EXIST, THERE IS NO PRODUCTIVITY MEASUREMENTS	<input checked="" type="checkbox"/>
QUALITY /SERVICE CONTROLS	<input type="checkbox"/>	QUAL CONT ARE BEING DESIGNED - NOT IMPLEMENTED TRACKING OF SERVICE DATES, SERVICE FEEDBACK EXISTS NOT INSTALLED - WAITING FOR AUTOMATION	<input checked="" type="checkbox"/>
EMPL SKILL DEVELOPMENT	<input type="checkbox"/>	BASIC FLEX TOOL EXIST, IT LACKS SPECIFICITY AND BENCHMARKS, LACKS SUPV INVOLVMENT	<input checked="" type="checkbox"/>

### SUMMARY OF ELEMENT EXISTANCE



### SUMMARY OF ELEMENT UTILIZATION



3. Although you generate considerable data, this information will have to be upgraded to become more effective and it is not currently being used to get back to the employees who are creating productivity and quality problems. Although the production management system elements exist, 90% will require upgrades and 10% do not exist and must be developed. Poor compliance and utilization of the elements which exist have minimized management systems as a useful tool to identify problems and to control labor costs. None of the existing elements are being used effectively, while only 40% of the elements are being marginally used and 60% are not being used at all.

- Your current volume forecast has obvious weaknesses. Your current forecast is not built upon activity based work content. The base data does not account for work content by product mix. Also, the current forecasting techniques do not recognize the variances between resale orders. We noted logic problems and base parameters which can not be verified. The fact that you have no historical information limits the accuracy of the current forecast. Although that situation is unavoidable, your systems lack a feedback mechanism that tracks actual order input so that the current forecast can be continually upgraded based upon actual input trends.

- You lack activity based standards which could be used in the forecasting, planning and work assignments. Currently you only have general average times to process an order which does not account for product mix between unbundled and resale nor the degree of complication within the resale product group. You lack objective information that could be used as base data to be used to develop a credible work volume forecast. Without this information it is impossible to effectively plan or assign work to balance the workload between employees. You can not therefore evaluate performance by individual or work group. As a result, supervision can not identify training needs and take corrective action. Problems tend to continue for extended periods of time which inflates your operating cost and limits customer service.

5a. We analyzed your structured training process with your staff support, trainers, line management and trainees. We determined that your current training process is less than effective. While most of the basic elements of the process are present, significant upgrades are required to make them effective. Of the elements which are available, few are being used effectively by your organization.

- 40% of the basic elements exist and required no additional enhancements. For example, the screening process for the identification of candidates is functional and there are well developed agendas and modules to support the training process.
- 50% of the elements exist but will require significant upgrades to become effective. Process flows that define the steps necessary to successfully complete an order are vague and not usable training tools. The evaluation of lesson comprehension is subjective rather than objective. You lack an objective post testing vehicle to evaluate a trainee's level of comprehension. 10 modules actually have "lesson learned testing" but they are not being used by your people.
- The only element that does not exist is assessment effectiveness. There is no feedback to trainers relative to the effectiveness of their programs, as a result, weaknesses cannot be identified and enhanced. We administered a questionnaire to 28 recent trainees to understand their perceptions of the training effectiveness. The results indicated that 77% found the training inadequately prepared them for their task. The lack of supervisory follow up after the formal training was identified as a key concern.

- Although performance data is available, it is not being utilized by supervision to provide information relative to skills sets of the service reps. In addition, monitoring / observing is still in the development stages and has not been implemented. The result is that you cannot provide meaningful feedback and coaching to your employees to further their development.
  
- Only 10% of the elements are currently being utilized effectively. Another 50% are only marginally used and 40% are not being used at all. There are significant opportunities to improve the ongoing effectiveness of your current training process by installing on the floor training development with supervision through effective coaching. Trainees are somewhat abandoned by BellSouth once they are assigned to their areas.



5b. We conducted an evaluation of your employee skills flexibility to identify the training needs of your service representatives. We determined that there are significant training needs within this "experienced" work group. These needs have resulted in limited employee flexibility and the inability to maximize the effective use of your manpower which limits the quality of your order processing.

- Our studies indicate that only 48% of the key jobs have employees who are qualified to perform there functions effectively. This has significant impact on the supervisors' ability to make adjustments for absenteeism and volume mix.

- According to their supervisors, 35% of the jobs have employees who are marginally qualified to perform the tasks. Marginal means they are only able to perform selected functions of a total order processing flow without constant follow up. This is a key point, since we saw very little training of employees by the supervisors during our studies.

- We observed different methods being used by multiple employees to perform the same task. This resulted in significant variances in both quality and productivity. This frequently results in errors and rework as vital steps of the process are missed and must be corrected after the fact. This is impacting your customer service and unnecessarily inflating your order processing time.

- Ineffective employee cross training restricts productivity and reduces your ability to meet volume demands. 17% of the people are not qualified to perform the functions. This is having a negative impact on both productivity and quality.

- 38% of the people, in the supervisors' opinion, are qualified to perform the functions of the department successfully.
- Only 10% of the people, in the supervisors opinion, are qualified to perform the functions of the department and possess the ability to train fellow workers.
- Instead of training and developing your people to do the work right the first time, you rely on rework to find errors. These activities do not add value and unnecessarily inflate your operating cost and order lead times.







- System elements such as staffing determination exists however, without activity based work standards you can not determine the actual number of people you will need to process a given volume of work. Without this key element of an operating system, crewing decisions are currently be made based upon faulty conclusions and inaccurate information. As a result you are planning an excessive number of employees to handle forecasted volumes which increases your operating labor cost.
  
- Your current systems contain elements which could be used for short range planning and backlog controls. Your short range plan does not use activity based standards to determine work planning. These elements are not being used by most supervisors and are not effective. Backlog controls exist but have the same problem as they are not based upon realistic work standards. Neither the planning elements nor the backlog controls are tied to the forecast. As a result you have no way to monitor actual work input on a continuous basis so that the forecast can be upgraded. The lack of short range planning tools restrict the supervisors ability to control work backlogs and sequence work assignments.
  
- Although you have daily assignments sheets, they are not being used by supervisors to assign and follow up on work in progress. You lack a systematic approach to follow up on work assignments. You do not have elements that require supervisors to objectively review work assignments compared to standards to actual work completed. As a result, your supervisors cannot identify operating problems that are causing productivity, quality and service problems on a timely basis.

- Your best practice definition exists only as a macro level. You lack detailed documentation of your key processes by step in sufficient detail that they can be used as a training tool. Without this level of documentation, employees who have questions must interrupt fellow workers who might have an opinion on how to process the order. This situation not only lowers labor productivity, it also has a negative effect on quality on various methods and techniques are used to process the same type of order. You lack standardization to your processes that insure a constant level of quality.

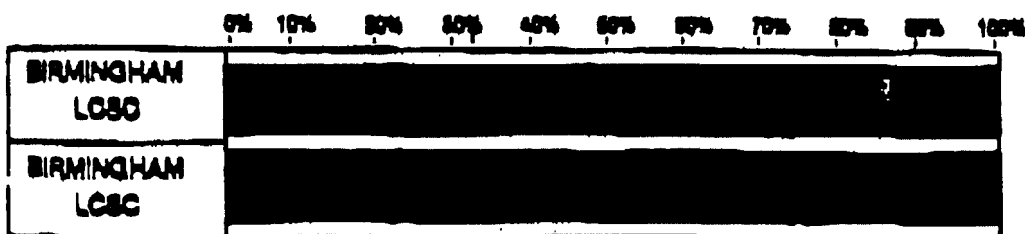
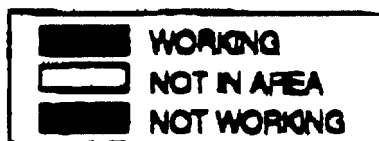
- You do not have individual and departmental productivity measurements. This inability to determine accurate productivity levels restricts the identification of operating problems and perpetuates lost time.

- Currently both quality and service measure are being developed but have not been installed. As we have noted in other system elements which do exist, the challenge you face is not the design of these management tools, it the implementation and use of the tools by supervision. You lack an installation process that insures that supervisors are trained in the preparation and use of system elements. You must also spend time on the floor to insure that supervision understands how to use the tools to identify quality and service problems on a timely basis to identify training problems.

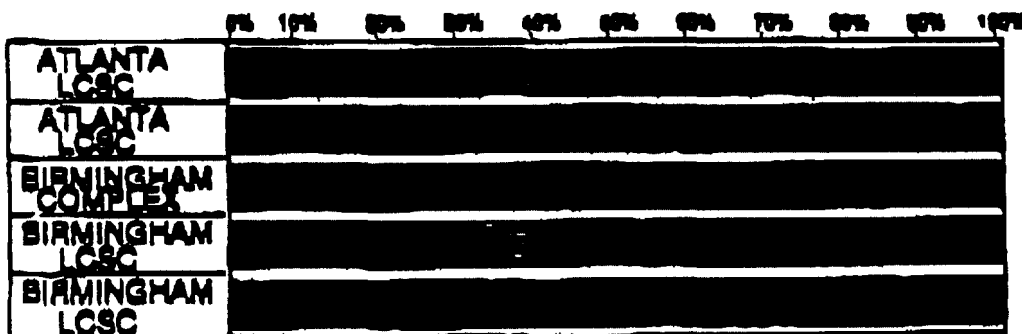
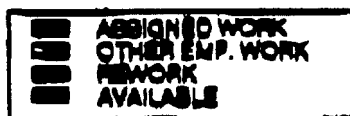
- Employee skills flexibility charts exist in some of the areas, however, they are not being actively used by supervisors to identify training needs so that they can be addressed. Also you lack benchmarking that can be used to quantify training needs. For additional information on this key area of your business, please see the employee skills section of this summary.

# BELLSOUTH - LCSC ATLANTA - BIRMINGHAM

## SUMMARY OF EMPLOYEE UTILIZATION OF TIME



## SUMMARY OF EMPLOYEE UTILIZATION TO TIME



## SUMMARY



4. As a result of the lack of clear goals, inconsistent work processes, employee skills deficiencies and a passive management style, our analyses indicate service representatives are either not working or not in their area 39% of the time. Detailed analysis of the work being performed indicates that 7% of the time representatives are doing someone else's work and 27% of the time they are engaged in non value added rework. Our analysis indicates that the amount of time being spent doing work right the first time is only 38 to 48% of the rep's time. Due to various operating, training and quality problems which are not being resolved, your current level of labor utilization is inflating your operating costs, and building excessive lead-times into your order process.

Problem solving techniques are not effective in most cases. We observed supervision waiting until the employees brought problems to their attention. We observed that several times the supervisors either take problem orders upon themselves to resolve or reassign the orders to other workers with the "know how". Supervisors also do not identify and address the root cause by providing feedback to the representative. This reactionary, non supportive management style contributes to the perpetuation of quality problems and non value added rework.

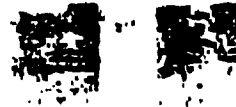
Supervisors very rarely follow up on work in process. This lack of supervisory involvement has left your employees to solve most problems by themselves. In the BallSouth LCSC environment, it is the employee's responsibility to locate their supervisor to get assistance. As a result, persistent problems tend to continue before corrective action is taken, and it often deals only with the symptoms rather than root causes of the problem. Rep's spend from 10% to 15% of their day correcting errors which they had caused without management awareness or assistance.

- Some reps' exhibit poor work habits without management awareness or corrective action. We observed several cases where workers were repeatedly creating rework and delays for other BellSouth operations, but were not confronted by their supervisors, thereby condoning the practice. Supervisors rely on system edits and error reporting to correct the problems rather than confront employees on poor work habits, poor disciplines and skills deficiencies.
- In your LCSC environment, the clarification requests seem to be used as a "fall safe" to catch quality problems and missing input information prior to order processing. We noted situations in which every portability order required clarification due to missing information. 10 to 12% of the rep's day was wasted getting clarification from the customer. Management is not aware of this condition and is not gathering the data necessary to develop a corrective action strategy with the account teams to solve the problems before they hit the LCSC and force lost time into your operation.
- Improperly trained employees are forcing lost time into the operation. 7% of the representatives time is spent doing work for another employee. The single largest cause of this situation is because an employee must ask for assistance or hand off the order to another representative who can resolve the problem.
- We observed situations where non compliance to existing procedures was forcing lost time and rework into the operation. For example, when a representative uses the phone to ask for clarification, and later hands the order to a fellow employee to complete, the second rep does not know what work has been done.

- We observed your representatives wasting their valuable time doing the work which is to be completed by the clerks in the department. Several of the reps will leave their station in order to send faxes, which is supposed to be done by the clerks. Oftentimes when a representative leaves their work station they interrupt the rhythm of their work and stop by fellow employees' workstations to visit.

- The layout of the work areas is not conducive to foster a supportive environment for the service representatives. Your reps are isolated in cubicles which hinders supervisory coaching and support. Those who seek help must leave their work areas thus forcing lost time into the operation. Since you are starting up the LCSC you have a ideal opportunity to create an environment which fosters management support and interaction.

Director of the  
Administration



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# BELLSOUTH LCSC

## TRAINING AND DEVELOPMENT PROCESS

 ELEMENT EXISTS  
EFFECTIVELY UTILIZED

 EXISTS- REQUIRES UPGRADE  
POOR UTILIZATION

 DOES NOT EXIST  
IS NOT UTILIZED

SYSTEM ELEMENT	EXIST	DOCUMENT	UTILIZATION
SKILL REQUIREMENTS		CURRENTLY USE WAGE SCALE 23, SERVICE REP'S. NOT SURE IF THIS	
SCREENING TESTS		IS RIGHT SKILLS FOR THE LCSC SERVICE REP POSITION.	
TRAINING AGENDAS		THERE ARE SEVERAL TRAINING AGENDA'S. HANDOUTS & GUIDES	
PROCESS FLOWS		THERE ARE ORDER FLOWS. NOT DETAILED ENOUGH FOR TRAINING	
COMPREHENSION EVALUATION		EVALUATION IS SUBJECTIVE BY INSTRUCTOR. LESSON TESTS OPT.	
EFFECTIVENESS ASSESSMENT		NO ASSESSMENT AT THIS TIME BUT WILL BE DEVELOPED	
TRAINING STATUS CHARTS		CTRS AVAILABLE, SUPV TRACKS TRAINING RECEIVED MANUALLY	
IND / TEAM PERF TRACKING		DATA AVAILABLE (Errors, Orders Processed) BUT NOT USED TO EVAL	
MONITORING / OBS		OBS/ MONITORS ARE NOT STRUCT EXCEPT PHONE. POOR LAYOUT	
INDIVIDUAL COACHING		COACHING IS NOT STRUCTURED AT THIS TIME.	

### SUMMARY OF ELEMENT EXISTENCE



### SUMMARY OF ELEMENT UTILIZATION



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6. Our analyses of your work flow processes for both resale and unbundled orders indicates that your current level of process documentation is insufficient to assure process compliance and integrity. You lack the ability to use process documentation as a training aid that can be used to upgrade the skill sets of you representatives. There is a lack of clearly defined process requirements. As you transit from the current manual process through semi automated to ultimately an automated work process, there will always be the need to detail and validate the steps to insure quality and service. The true work content of each step or activity must constantly be updated to realize a continuous improvement culture within the LCSC process.

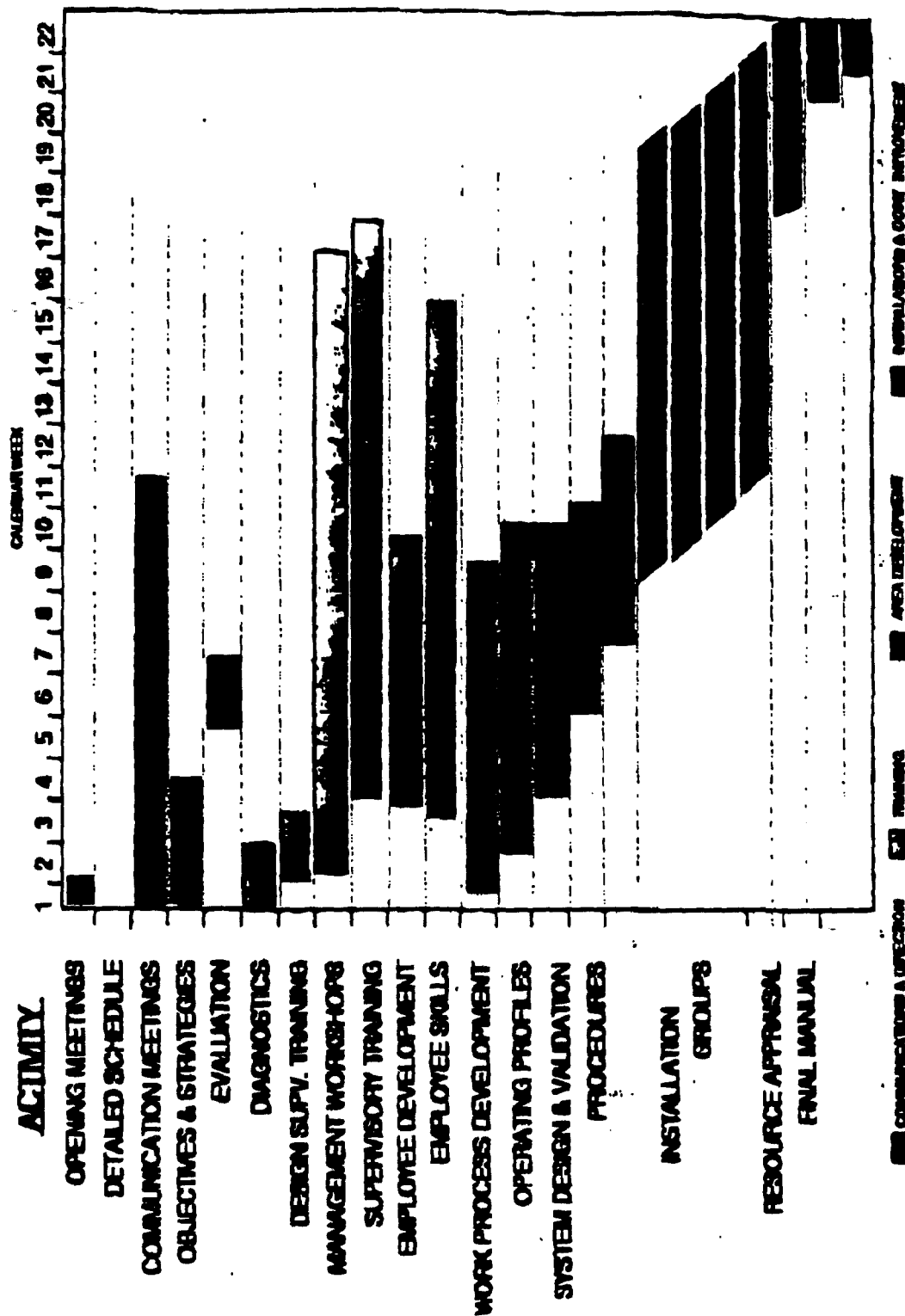
- Processes are not being used to assess the skills proficiency of you service representatives. Without the detail it is impossible to objectively identify training needs and if needs are not identified, they cannot be addressed to constantly improve the skills of your service representatives.
- Activity based standards are not being used to develop your force sizing models. Since the work content varies by order type, this base data must be maintained and upgraded to insure that as your product mix changes, you have the ability to properly determine the manpower requirements.
- Detail process flows do not exist and cannot be incorporated into a continuous employee training process. As a result, you are not keeping up with the latest upgrades to the order processing flow and the frequency of errors tends to increase. This has a negative effect upon both internal and external customer service.

- Failure to have the process detailed step by step has limited your ability to quantify and qualify the procedural barriers that affect productivity and quality. This diminishes the ability of the support operation to be able to enhance and react to the most significant barriers. As a result, the support functions are left to design improvements to the needs as they view them, not as the people responsible to deliver your service know the needs to be.
  
- As new services are introduced, new processes will have to be developed and detailed. The challenge is not to document your current processes. The challenge is to have the knowledge and ability to repeat the detailing process to insure that the LCSC always has effective processes that are properly balanced and maintained.

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# BELLSOUTH - LCSC ATLANTA - BIRMINGHAM

## PHASE I PRELIMINARY KEY EVENT SCHEDULE



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## **WHAT WE PROPOSE**

### **OVERVIEW**

We propose a 22 week concerted effort to upgrade the management operating systems, detail/update/test and measure work procedures/processes. We will also improve the effectiveness of the skills development process and develop a performance oriented supervisory culture at the BellSouth LCSC operations in the Atlanta and Birmingham locations. Working closely with your management group, we will change the image of supervision from a task work/passive one to a supportive/proactive one. We will design and install management systems to give your supervisors and managers the information they need to effectively control all of the functions within their areas. We will train your supervisors and managers "on the floor", so they truly understand how to apply and use the systems and management concepts in their operations.

### **SPECIFICS**

1. Together, we will conduct a series of opening meetings with support and operating departments during the first week, to set the stage for the process that is starting. We want all levels of personnel to understand that this is a program requiring their active participation, which will be a very positive experience.
2. Together, we will prepare a detailed weekly schedule during the first 3 weeks, to provide a plan for accomplishing all of these tasks in the allocated time. This will also enable management to follow along with our schedule on a weekly basis.
3. We will develop a method to assess the status of deliverables to measure the attainment of our proposals on a weekly basis. This method will be finalized by the 7th week. By the 10th week we will establish a reference level of historical performance indices, setting future targets, and tracking attainment of these targets. The on-going tracking will be turned over to the operating and support organizations.

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4. We will complete the diagnostic assessment during the first 2 weeks of the process. We will administer our Supervisory Opinion Questionnaire (SOQ) to the remaining supervisors and managers not included in the analysis assessment. This will provide us with a profile of the overall groups' strengths and weaknesses, so that training can be focused specifically on the needs of your people. The profiles of strengths and weaknesses for each individual will also help us to follow up and maximize their personal development.
5. Together, we will generate a supervisory behavior model. We will design the supervisory workshops based on the weaknesses we observed, and reconfirmed by the diagnostic questionnaire administered to your supervisors and managers. This program will be designed by the 4th week.
6. We will initiate a process in the 1st week to communicate specific LCSC's findings, proposals, areas of focus, and priorities to all departments. This will ensure that each group understands their part in achieving overall objectives, the strategies to be utilized in achieving specific deliverables.
7. We will develop operating profiles in the first 9 weeks of the change process. This is the process of identifying all of the activities, volumes, standards, associated skills levels, quality levels, service levels and document current systems needs.
8. Data development is the process where we observe activities, and teach your people to make observations to set benchmarks. We will collect information with your supervisors and managers to establish realistic planning guidelines that they can use with confidence for planning and follow up purposes. The data gathered will also be used to complete force sizing models to establish short range production planning requirements.

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9. We will upgrade the management operating systems with the supervisors and managers to provide all of the currently missing elements.

- Forecasting - mix, evaluation, cycles
- Accurate planning guidelines
- Staffing requirements determination
- Effective daily plans
- Work assignment and follow-up
- Departmental and individual productivity reporting
- Performance to plan and feedback - quality, service, cost
- Lost time identification and documentation

10. A Quick Results Program will occur during the first 10 weeks of the project. These are elements of the system which can be installed prior to the long term cultural change phase of the project. These action steps are outlined in our Quick Results Schedule.

- Align organization to focus on value added activities
- Area Layout
- Documentation of core flows
- Definition of skill deficiencies
- Correct gaps in training and OTF development
- Design Hopper - sample order generator to gauge quality and capacity utilization

11. We will review your current work mix and make recommendations to balance the resources to clarify responsibilities, and more effectively control the work processes.

12. Preliminary procedures will be written to provide answers to system questions that may arise during the change process.

- Purpose - Why each system element exists?
- Responsibility - Who prepares, reviews and takes action from each element?
- Frequency - How often is each system element prepared?
- Distribution - Where do copies of each element go?
- Preparation - Where does data come from and how is it used?

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13. Management workshops will start in the 3rd week so that managers are prepared to support and reinforce the more in depth workshops that the supervisors will be going through, and be prepared to co-facilitate those sessions in later workshops.
14. Supervisory workshops will start in the 4th week of the change process. These workshops will cover both the technical aspects of supervision, and the tactical/interpersonal side of dealing with their people. The program will involve workshop sessions, to establish the concepts of effective supervision, as well as one on one follow-up with the supervisors to help them apply the concepts in real life situations. We will coach them on appropriate behaviors required to meet expectations. These workshops support the system upgrades and assist the supervisors in identification of barriers to productivity, quality and service. These workshops will also provide the basic skills necessary to effectively deal with the barriers identified.
15. We will, with your people, enhance the employee skills development process. We will review the selection process to ensure proper job requirements are met. We will upgrade training materials to include "as is" activities / steps within the work flows. We will incorporate on the floor supervisory follow up and coaching to facilitate the mastering of work activities.
16. Employee skills training programs may be jointly enhanced for key activities that associates perform. Working with technical advisers from your organization, we will determine the best methods for various key activities, and then design programs to teach these methods to future trainees. We will also assess the skills flexibility for current and expected requirements. We will schedule training where needed and focus coaching to specific steps within the work processes. This will include integrating your existing training materials into an ongoing associate training program. Together with management, we will determine the requirement of such programs by the 6th week.
17. Dry / Wet running is the process where supervisors and managers can test and practice using the various controls to demonstrate the capacity and gain confidence in the reliability of the expectations that have been set. Dry / Wet running includes testing proposals on operating system upgrades, skills development enhancements, and sample order "hopper" generator system.

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